



Instructional Services  
*presents*

## EndNote 4 (Windows)

<http://www.isiresearchsoft.com>

**Training Schedule:** <http://nihlibrary.nih.gov/seminars/seminarschedule.htm>

### Course Objectives:

1. Create, open and close a library.
2. Create a new reference, edit a reference, search for a reference, find duplicate references.
3. Import references from databases such as PubMed and Web of Science using appropriate filters.
4. Use connection files to search PubMed and OVID remotely.
5. Use EndNote with Word to insert citations and format the document references and bibliography in different journal styles.

### Introducing EndNote

EndNote is:

- a **Reference Database**—it specializes in storing, managing, and searching for bibliographic references in your private reference library.
- an **Online Search Tool**—it provides a simple way to search online bibliographic databases and retrieve the references directly into EndNote. EndNote can also import data files saved from a variety of online services, CD-ROMs, and library databases.
- a **Bibliography Maker**—it builds lists of cited works automatically. Use EndNote to insert citations into word processing documents and later scan those documents for in-text citations to compile a bibliography in any format that you need. If you use Microsoft Word or Corel WordPerfect, the EndNote Add-ins integrate seamlessly with your word processor.

### The EndNote Library

An EndNote library is a collection of references, each containing the information required for the creation of a bibliography. Additional information such as keywords, notes, and abstracts can also be stored in these references.

- Each library can store up to 32,000 references or grow to be 32 MEGABYTES—whichever comes first.
- The Library window displays the first author, year, and title of each reference, sorted in alphabetical order by first author.
- There is no limit to the number of libraries you can create.
- Libraries created with the Macintosh or DOS versions of EndNote can be used by the Windows version of EndNote, and vice versa.
- Each library is a separate file that can be independently moved, copied, renamed or deleted.

## Creating, Opening and Closing Libraries

Each open library will appear in its own library window. You may have several libraries open at one time. You may specify a default library that will be opened when EndNote starts.

- Choose **New... from the File menu** to create a new, empty, EndNote library. Select the directory where you want to store the library and enter a name for the file. EndNote will append the .ENL extension to the file name if you do not include an extension.
- Choose **Open... from the File menu** to open an existing library.
- Choose **Close... from the File menu** to close an open library. All open libraries will be closed automatically when you quit EndNote. References are stored in the library as they are entered, so you don't have to explicitly close the library to store your records to disk.

### Open Library

The screenshot shows the EndNote 4 application window titled "EndNote 4 - [PALEO.enl]". The interface includes a menu bar (File, Edit, Text, References, Terms, Paper, Window, Help) and a toolbar with icons for file operations and searching. A list of references is displayed in a table with columns for Author, Year, and Title. A context menu is open over the list, showing options like "Numbered", "Annotated", "Author-Date", "Show All", and "Select Another Style...". A preview pane at the bottom shows the full citation for the first reference.

Annotations point to the following features:

- Search Library:** Points to the search icon in the toolbar.
- Change sort order: ascending to descending or vice versa:** Points to the sort order dropdown menu.
- Insert new reference:** Points to the "Add New Reference" icon in the toolbar.
- To change format of reference in Preview Pane. To add other styles to the list, see 'Setting Bibliographic Styles':** Points to the style dropdown menu.
- EndNote Toolbar:** Points to the toolbar area.
- Selected reference is highlighted and displayed in preview pane:** Points to the first reference in the list and its corresponding entry in the preview pane.
- Total number of references in Library and total being displayed:** Points to the status bar at the bottom left, which reads "Showing 200 out of 200 references."
- Click here to turn preview pane off or on:** Points to the "Hide Preview" button in the bottom right corner.

Author	Year	Title
	1971	Valdez v. Black
	1994	National Environmental
	1997	Exchange of ideas and information from an issue of Competitiv Change in the Electri...
	1999	Sequoia Ecosystem and Recreation Preserve Act of 1999
Akiyoshi	1988	Radiative aspects of the Antarctic ozone hole in 1985
Allen	1988	Modern-period muddy sediments in the severn estuary (Southwestern UK) - A pollut...
Alvarez	1984	Evidence from crater ages for periodic impacts on the earth
Angell	1988	Relation of Antarctic 100 mb temperature and total ozone to equatorial QBO, equat...
Apollonov	1988	Batyrbay section, South Kazakhstan, USSR - Potential stratotype for the Cambrian...
Argus	1993	New paleontological excavation techniques
Argus	1991	Stratigraphic excavation techniques for paleontologists
Babcock	1988	New Permian conulariids from Devon Island, Canada
Badejoko	1988	Unusual titanium-rich oxide mineral from peralkaline granite of Kigom Complex, nort...
Baginski	1988	Lightning-related fields in the ionosphere
Baker	1988	Geological fluvial geomorphology
Barnes	1988	The proposed Cambrian-Ordovician global boundary stratotype and point (GSSP) i...
Bartschwinkler	2000	Cycle of earthquake-induced aggradation and related tidal channel shifting, Upper T...
Bearce	1998	New paleontologic evidence constraining the age and paleotectonic setting of the T...

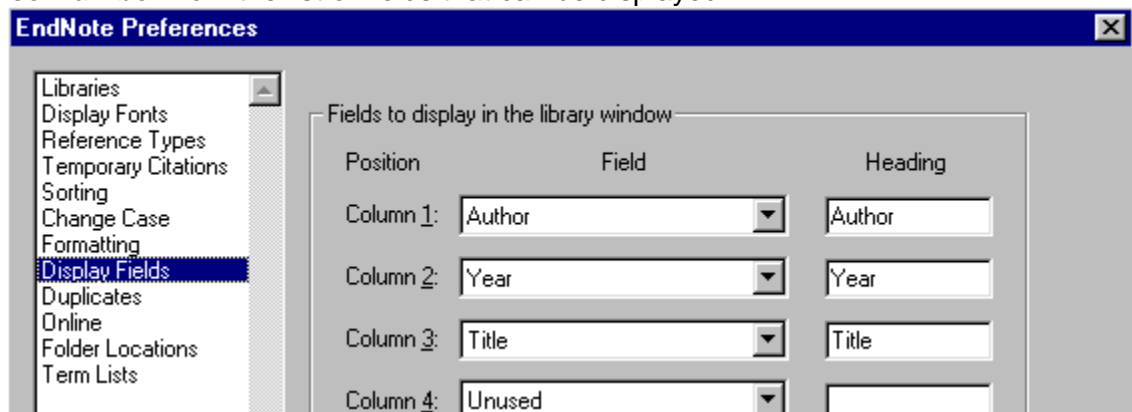
1. Akiyoshi, H., M. Fujiwara, and M. Uryu, *Radiative aspects of the Antarctic ozone hole in 1985*. Geophysical Research Letters, 1988. **15**(8): p. 919.

Showing 200 out of 200 references.

Hide Preview

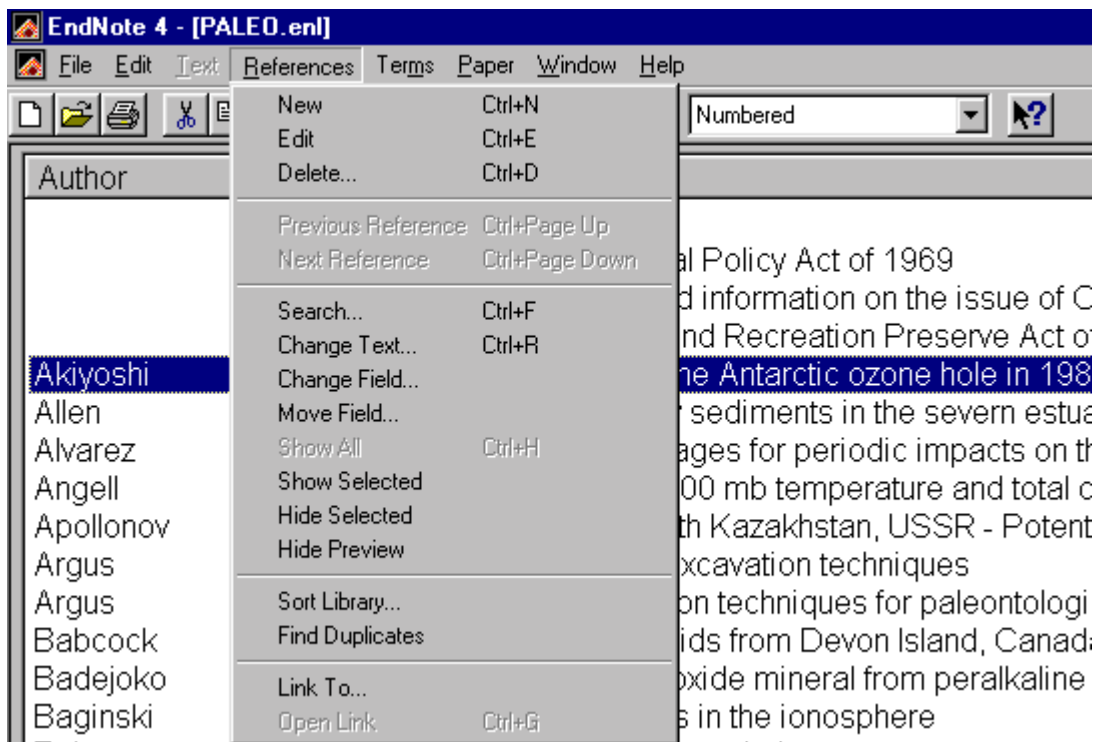
## Setting Preferences for EndNote Library display

In **Edit**, select **Preferences** to change various aspects of the default EndNote library display. For example, to display Record numbers, go to **Display Fields** and in column 4, click on down arrow and select **Reference Number** from the list of fields that can be displayed.



## Creating, Editing, Selecting, Searching for References

The **References** window is used to view or change the data in references.



### 1) Creating References

To create a new, empty reference, choose New (Ctrl+N) from the References menu. New references are assigned the Journal Article reference type by default.

- Select a different reference type by click on the down arrow and choosing a new type.
- New references can also be created by importing from other files, or by pasting references copied from other libraries

## 2) Editing References

- The reference type for the record can be selected from a list that appears at the top of the window.
- Pressing the Tab key will select the next field in the reference; pressing Shift+Tab will select the previous field.
- Double-clicking the EndNote Icon in the upper left-hand corner of the window, or pressing Ctrl+W, will close the reference and save any changes.

## 3) Selecting references

To select one reference, click on it with the mouse.

- To select a range of references, hold the Shift key down while dragging the mouse over the desired range.
- To select references not in a range, hold the Ctrl key down while clicking the desired references.
- To select all references showing in the library window, choose Select All from the Edit menu.

## 4) Searching For References

Choose Search from the References menu (or type Ctrl+F).

- Enter the word or phrase you are searching for as the first search term in the Search Window. Press Enter or click the Search button.

## 5) Finding duplicate references

The *Find Duplicates* command is used to identify duplicate references in a library.

- References are considered duplicates if the contents of the authors, year, title, and reference type fields are identical. Author names are compared only with regard to surname and first initial. Leading articles in titles ("A," "An," or "The") are ignored, as is capitalization.

After the search is complete, all duplicate references will be shown in the library. Duplicate records should be compared to determine which reference in a pair of duplicates should be deleted.

## Importing References: Step-by-Step

The easiest way to build your EndNote library is to import the references from standard sources such as online bibliographic databases and library catalogs. EndNote can import references from many different sources and formats. Below are the downloading formats for databases available from the NIH Library

### Database Downloading Formats

**PubMed:** EndNote Filter - Pubmed (NLM)

- Display citations in **Medline** format.
- Save citations in text format.

**Ovid Web Gateway:** EndNote Filter - Medline (OVID) or PSYCINFO (OVID) or BIOSIS (OVID)

- Select items by clicking on the empty box to the left of a citation.
- Scroll down to Citation Manager.
- Under Citation Format, choose the "Reprint/Medlars" option.

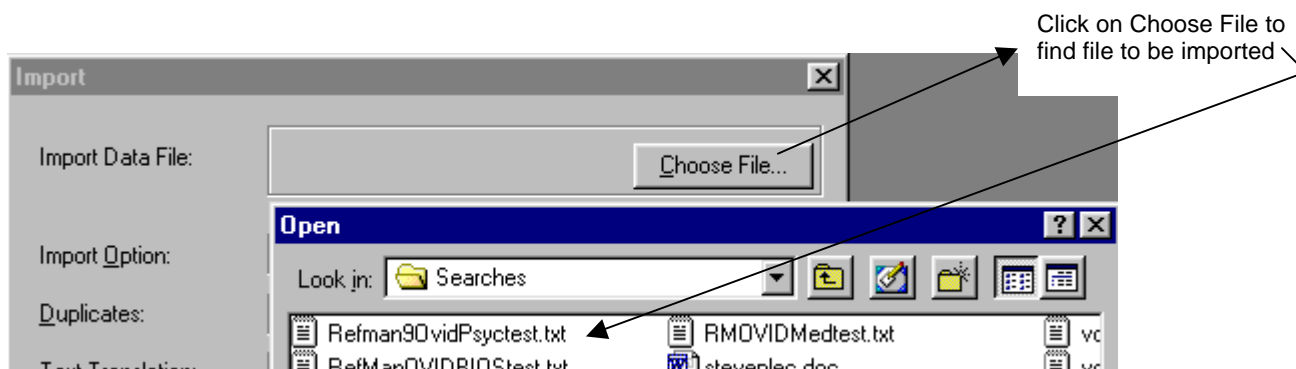
**Internet Explorer Users:** Under Action, click on Display. Use 'Save As' in File to save file. Save file with extension .txt (e.g. filename.txt)

**Netscape Users:** Under Action, click on Save. Save file with extension .txt (e.g. filename.txt )

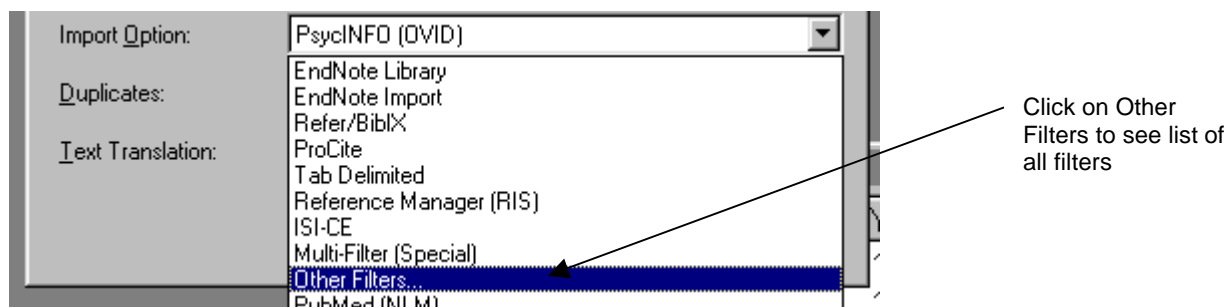
### Internet Grateful Med EndNote Filter - PubMed (NLM)

- From the results screen, click on the **Download to disk** button
- From the IGM Download Format Screen, specify number of records to be downloaded, choose short or long record option.
- Click on **Prepare Download** button. Select **Tagged MEDLARS** format. Click on **Download Now**.

1. Open the library to which you want to add the references.  
**Note:** We recommend that you create a new library for this purpose for all import formats, except EndNote libraries, in case there are problems with the data file. These libraries can be imported into your main library after the results are checked.
2. Choose Import... from the File menu. The Import box will open.
3. Click the Choose File button in the Import dialog, and select the data file you want to import.



4. Select the import format from the Import Options list. If you want to use an import filter that does not appear in the import options list, select "Other Filters..." and locate the filter you want to use. The filter component of an EndNote connection file can also be used as a filter; Choose "Use Connection File..." to use a connection file as a filter.



5. Select an option for treatment of duplicate references from the Duplicates list.
6. Click Import.

## Direct export from Web-based Databases

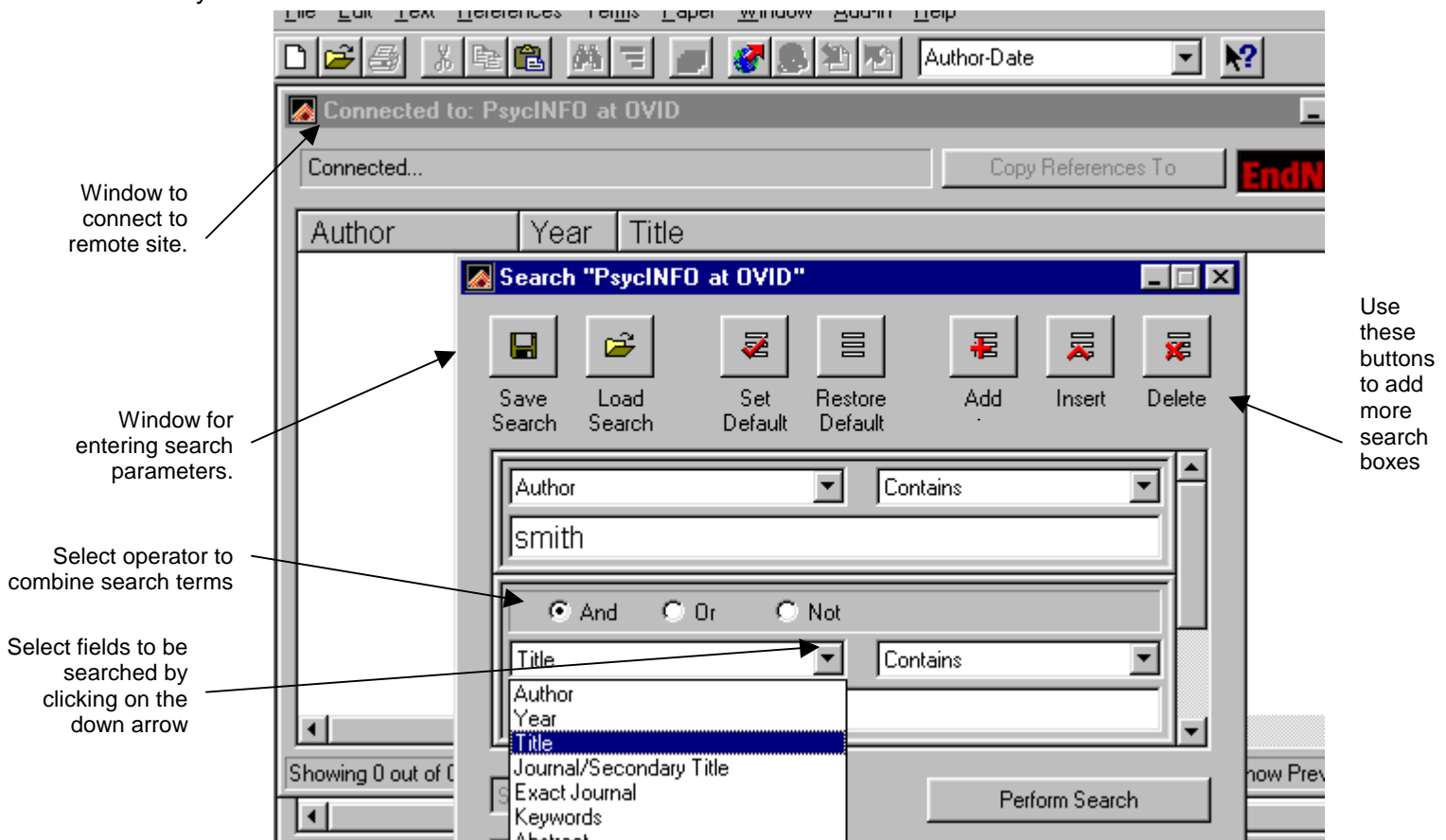
Certain web sites contain a download button that will send your search results directly to EndNote, pick the correct import option, and start the import process automatically. All you need to do is choose the EndNote library into which the data should be imported. This "direct export" does away with the additional steps of saving the references to a text file, and then importing that file with the appropriate filter. Information providers currently supporting a direct import option at their Web site include BioMedNet, and ISI's Web of Science.

## Connection Files

Using EndNote's Connect... and Search... commands, you can search online bibliographic databases just as easily as you can search an EndNote library on your own computer! The results of your searches appear as EndNote references—ready for you to store in your own EndNote library.

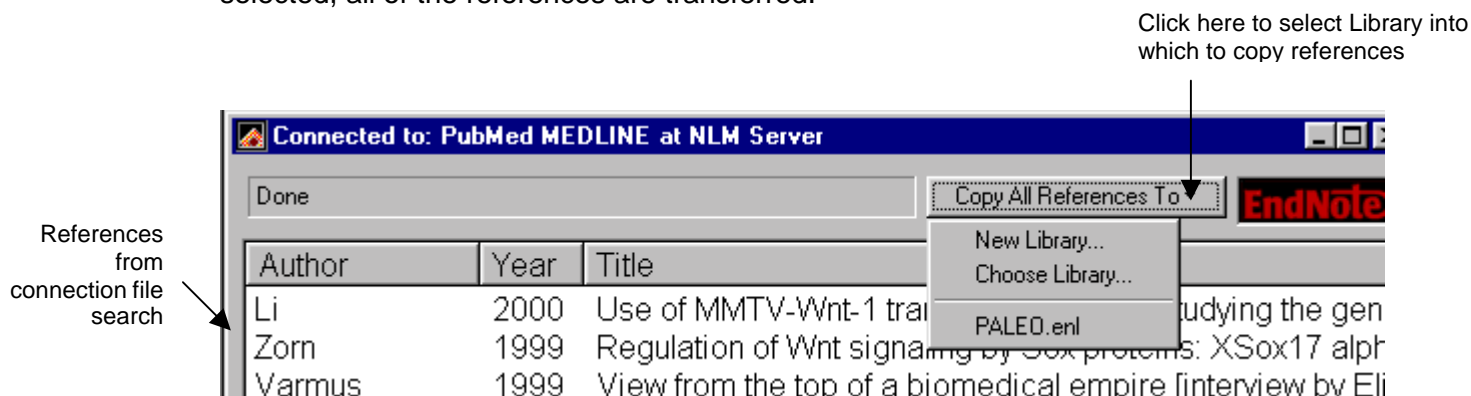
### To connect to and search a remote database:

1. Choose File...Connect...
2. EndNote will display a standard file dialog. Locate the connection file appropriate for the database you wish to search and open the file.
3. EndNote will attempt to establish communication with the database server.
4. If the database server you wish to search requires password authentication, EndNote will display a password dialog. Enter your user ID and password for the server.
5. Once the connection to the database server has been established, EndNote will display an empty Retrieved References window and a search window. You are now ready to begin your search.



6. When you enter a search term, the default is set to search for the term in any field. To change the default, click on the down arrow next to Any Field and select a specific field to be searched. You can combine searches in different fields by adding as many search boxes as you require. Be sure to specify how you want the search terms to be combined (AND OR NOT)
7. If your search matches references in the databases, EndNote will display a dialog indicating the number of references found and asking you if you want to retrieve them. Click OK to begin retrieving the references, or cancel if you wish to change the search term.
8. EndNote will begin retrieving references from the server. You can pause the retrieval by clicking the Stop/resume button in the retrieved references window.

9. Select the references you wish to keep. Multiple references can be selected by dragging the mouse or by clicking individual references while pressing the Shift or Ctrl keys.
10. Click the Copy References To... menu at the top of the window. Choose the option to copy them to any currently open library (names of currently open libraries are listed in the menu), to a new library, or to an existing library that is not already open. If no references are selected, all of the references are transferred.



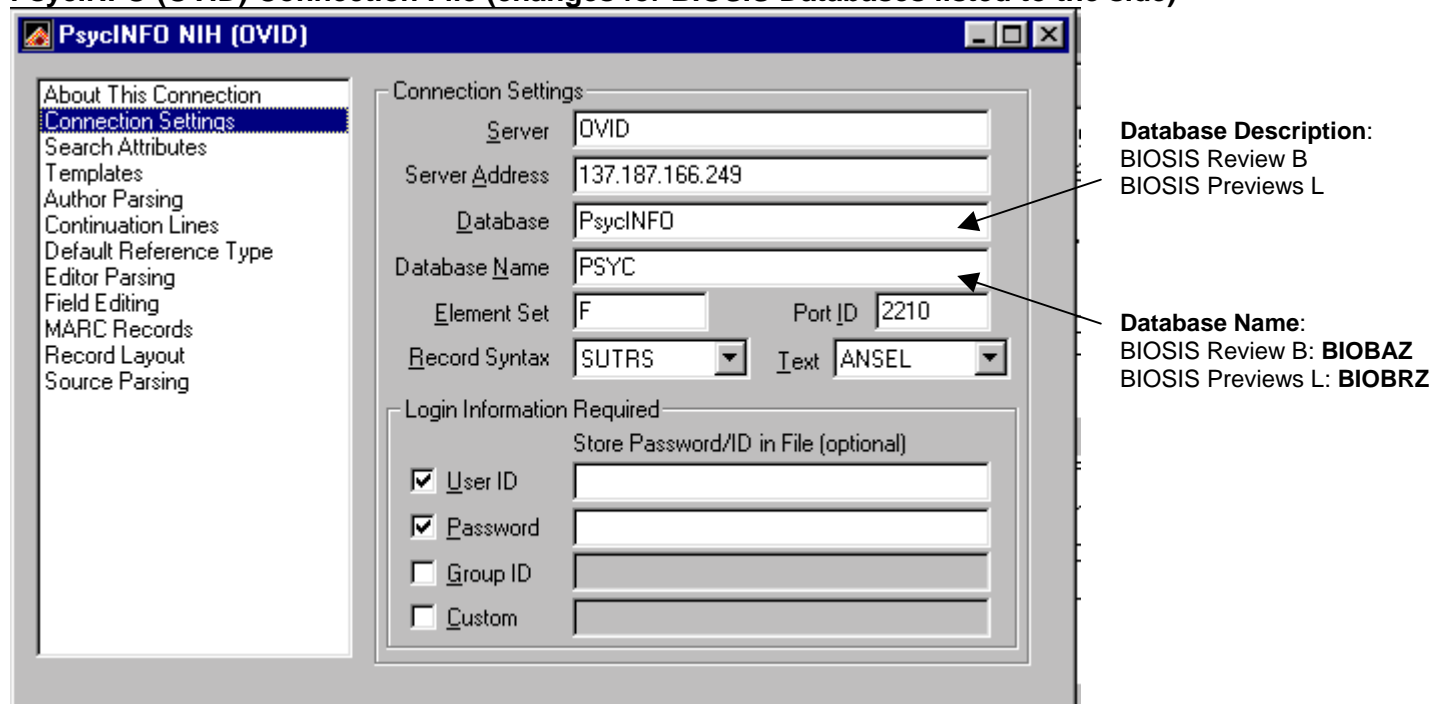
### Editing OVID Connection Files

The OVID connection files for PsycINFO, BIOSIS Previews and BIOSIS need to be modified for use with the NIH versions of these databases.

To edit a connection file:

1. From the File menu, choose Connection Files and select Open Connection Manager.
2. Select the file to edit and click Edit.
3. Choose Save As from the File menu immediately after opening the connection file for editing. Name the new copy of the connection file and save it in the Connections folder
4. Enter the appropriate changes for connecting to OVID at NIH.
5. Choose Save from the File menu.

### PsycINFO (OVID) Connection File (changes for BIOSIS Databases listed to the side)





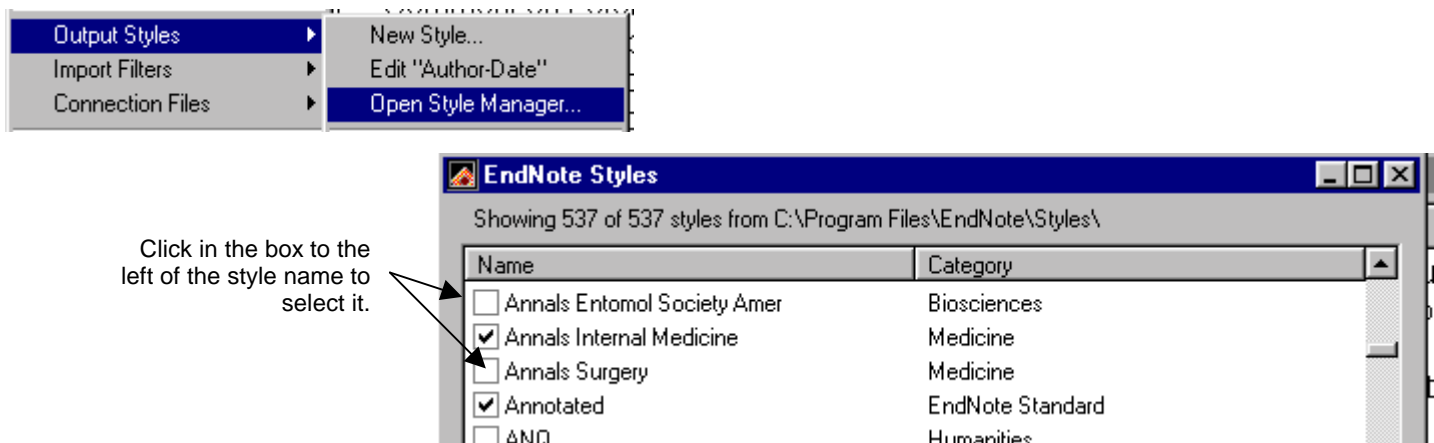
## Creating bibliographies

EndNote also can be used to create bibliographies. Bibliographic styles are used to control the appearance of references in a bibliography. The style takes care of all text styles, punctuation, and sorting required for the citations and bibliography, as well as which fields are included in the bibliography. A set of standard styles is installed in a \STYLES subdirectory of the directory where the EndNote program is located.

### Setting Bibliographic Styles

The bibliographic style selected in the Output Styles submenu of the File menu (or the Styles menu in the toolbar) determines how EndNote formats the citations in your paper and the references in the bibliography. Choose a style from the Output Styles submenu when you are ready to create a bibliography. You can always select a different style and reformat your document at any point.

In File, choose Output Styles. Select 'Open Style Manager'. Mark all the journal styles of interest.



There are several different ways you can use EndNote to generate formatted references in your documents:

1. EndNote can format bibliographies in documents. These bibliographies are complete, as EndNote manages the in-text citations as well as the reference list.

### Word Add-in:

#### Inserting Temporary EndNote Citations into your Word document:

1. Position the cursor at the point in the document where you want to insert the citation.
2. Select EndNote from the Word Tools menu.
3. Select the reference(s) you want to cite. (See: Selecting references)
4. Select Insert Citation(s) from the EndNote Add-in menu.
5. The temporary citation will be inserted into the Word document.

#### Formatting the Bibliography

1. Choose Format Bibliography from word processor's Tools menu
2. Select an appropriate Style from the list.
3. Click on Format to begin formatting the paper. EndNote replaces the in-text citations with an appropriate format and appends the reference to a bibliography at the end of the paper. If you need to make changes such as adding or deleting citations, make the changes and select the Format bibliography command to generate a new bibliography.
4. If you need to change the style, repeat steps 1-3.



**No Word Add-in:****Inserting Temporary EndNote citations into your Word document:**

1. Switch to EndNote. (To switch between programs, click the program icon on the Taskbar.)
2. Select the reference(s) to copy.
3. Select Copy from the Edit menu (Ctrl+C).
4. Switch back to your word processor.
5. Select the Paste command in the word processor's Edit menu.

**Formatting the Bibliography**

1. When the paper is complete, save it, then open the paper in EndNote.
  2. EndNote will scan the paper, and match the temporary citations to references stored in your EndNote library.
  3. EndNote will generate a new copy of your paper, identical to the original, except that the temporary citations are replaced by formatted citations, and the bibliography is added to the end of the document.
  4. As you revise the paper, make the changes in your original document; repeat the formatting process to generate a new bibliography. You can add or delete citations, or format the bibliography in a different style.
2. Using the Copy Formatted command to insert individual references or entire reference lists into document.

**To copy formatted citations into your document:**

1. Switch to EndNote.
  2. Select the reference(s) to copy.
  3. Select the bibliographic style to use from the Styles menu.
  4. Select Copy Formatted from the Edit menu (Ctrl+K).
  5. Switch back to your word processor.
  6. Select the Paste command in the word processor's Edit menu.
3. Use File...Export... command to create independent bibliographies.

**To export references as a text file or independent bibliography:**

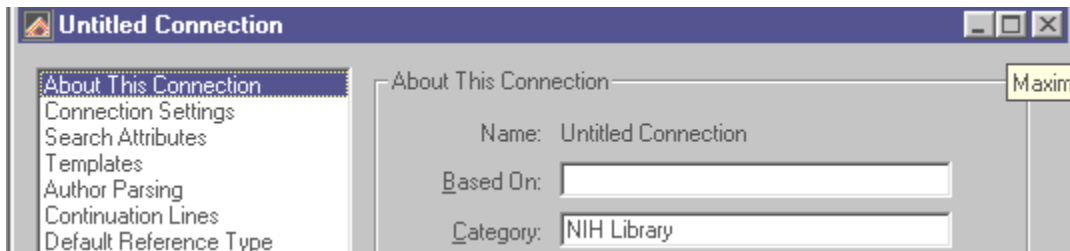
1. Select the library containing the references to be exported.
2. Select the references you want to export, then choose Show Selected from the References menu (if you want to export the entire contents of the library, choose Show All from the References menu).
3. Choose Sort from the References menu if you want to change the order of the references.
4. Select the desired bibliographic style from the Styles menu.
5. Choose Export from the File menu.
6. Select the file type for the exported file.
7. Provide a name for the export file, and select the desired drive and directory.
8. Choose Save.

## EndNote 4 Connection File for NIH Library Catalog

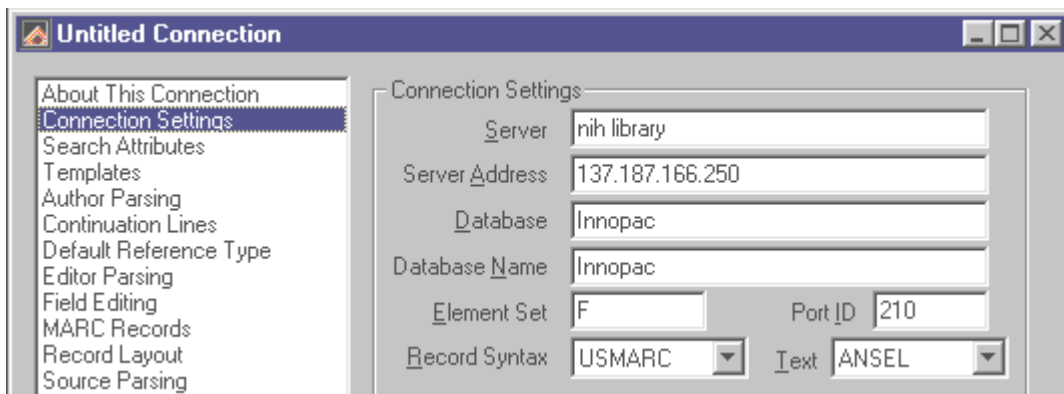
1. In File, in Connection Files, select **New Connection** file by



2. The new Connection File window opens to display the About this Connection information panel. Enter any comments or descriptions here for your own use.



3. Click on the Connection Settings option and enter the connection information.



4. Choose Save As from the File menu. Name the new connection file and save it in your Connections folder. You could name the file **NIH Library Catalog.enz**